Task Order 110 –
FP Data Mart Operations

FP Data Mart Operations Monthly SLA Metrics Report
Deliverable 110.1.1g

Period Ending: 12/31/02

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Introduction

This is the December monthly report for Task Order 110 – FP Data Mart Operations. The purpose of this task order is to provide the capability to sustain the FP Data Mart. The report information will be provided separately for each system.

FP Data Mart Availability for Production

**Note: Downtime for backups and scheduled outages are not shown

Date	Availability (%)	Notes
Sun – December 1	100%	
Mon - December 2	100%	
Tues - December 3	100%	
Wed - December 4	100%	
Thurs - December 5	100%	
Fri - December 6	100%	
Sat - December 7	100%	
Sun - December 8	100%	
Mon - December 9	100%	
Tues - December 10	100%	
Wed - December 11	100%	
Thurs - December 12	100%	
Fri - December 13	100%	
Sat - December 14	100%	
Sun - December 15	100%	
Mon - December 16	100%	
Tues - December 17	100%	
Wed - December 18	100%	
Thurs - December 19	100%	
Fri - December 20	100%	Between 12:15 & 12:35 PM on 12/20 Microstrategy was recycled to allow a restore to be run to alleviate an application problem with the Meta Data Database. Investigation is still underway & RCA # is 3744900.
Sat - December 21	100%	
Sun - December 22	100%	
Mon - December 23	99%	
Tues - December 24	100%	
Wed - December 25	100%	
Thurs - December 26	100%	
Fri - December 27	100%	

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Date	Availability (%)	Notes
Sat - December 28	100%	
Sun - December 29	100%	
Mon - December 30	100%	
Tues - December 31	100%	

FP Data Mart Operations Status

Work Accomplished During This Period

- Completed monthly FP load for November with data feeds from NSLDS, PEPS, and FMS.
- Provided daily monitoring of FP data mart availability.
- Continued tracking SIRs and enhancement requests.
- Continued to update user login information (add, remove, and reset IDs).
- Completed Data Mart Migrations for FP.
- Held bi-weekly FP Meetings with Power Users.
- Assisted Power Users with MicroStrategy report creation.
- Developed and amended mappings in Informatica to provide data to MicroStrategy reports.

Issues or Anticipated/Current Problems

- Security Issue regarding data filters within MicroStrategy. The solution to this issue is to upgrade to a newer version of MicroStrategy. We're currently working to resolve the outstanding MicroStrategy licensing issue that is preventing us from upgrading to the latest version (7.2.1; also known as 7i). Per FSA direction, it was decided not to upgrade immediately to an intermediate release (7.1.5), but to wait until the licensing issue is resolved to move to 7.2.1 (a.k.a. 7i).
- Awaiting award of optional months on Task Order to continue operations support through April 2003.

Planned Work for Next Period

- Continue MicroStrategy reporting enhancements and completion of outstanding SIRs.
- Continue to provide daily monitoring of FP Data Mart.
- Continue to update user login information (add, remove, and reset IDs).
- Continue issue resolution for open FP requests.
- Complete December FP monthly data load.
- Continue transition for upgrade to MicroStrategy 7i. Once the licensing issue stated above is resolved, we can proceed to upgrade to 7.2.1 (also known as 7i).

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Help Desk Monthly Throughput (FP)

Change Request

Category	High	Medium	Low	Total
Carry Forward	1	5	0	6
New	0	0	0	0
Closed	0	0	0	0
End of Month Balance	**1**	**5**	**0**	**6**

Data Request

Category	High	Medium	Low	Total
Carry Forward	0	1	0	1
New	0	0	0	0
Closed	0	0	0	0
End of Month Balance	**0**	**1**	**0**	**1**

Help Desk Request

Category	High	Medium	Low	Total
Carry Forward	2	0	0	2
New	4	0	0	4
Closed	4	0	0	4
End of Month Balance	**2**	**0**	**0**	**2**

Note: SIRs in POSTPONED status are not reflected in these numbers

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Help Desk Request Summary (FP)

Total Requests: 25

ID	STATE	TYPE OF REQ	TITLE	Priority	OPEN	CLOSED
229	Postponed	Change Request	Changes to Lender Capitalized Interest report	2. Medium	7/23/2002	
53	Assigned	Change Request	1.2.6 GA Fee Payments	2. Medium	7/30/2002	
254	Assigned	Change Request	1.2.6.1 GA Requested and Paid Fees	2. Medium	7/30/2002	
255	Assigned	Change Request	1.2.7 GA Fee Payments History Report	2. Medium	7/30/2002	
259	Postponed	Change Request	Drill to multiple templates in report - E32	3. Low	7/28/2001	
260	Postponed	Help Desk Request	Data Mart users lose access when NT patches are in	3. Low	7/18/2001	
261	Postponed	Change Request	Page-by area not working as expected	2. Medium	6/4/2001	
262	Postponed	Change Request	Search for Lender by name	1. High	6/4/2001	
263	Postponed	Help Desk Request	Login before projects are displayed	1. High	9/6/2001	
264	Postponed	Change Request	Subtotals appearing at top of Report	3. Low	2/21/2002	
265	Postponed	Change Request	We need to use dynamic quarter prompts	3. Low	2/22/2002	
266	Postponed	Help Desk Request	No Limit for login attempts	3. Low	3/4/2002	
268	Postponed	Help Desk Request	Automated Report to check for GA Access Violation	2. Medium	6/17/2002	
269	Postponed	Help Desk Request	Drilling Problem	1. High	7/15/2002	
282	Assigned	Data Request	Needs to insert manual VFA performance data	2. Medium	8/20/2002	
283	Assigned	Change Request	Add Graphs to FP Rel 2 Reports	2. Medium	8/20/2002	
284	Postponed	Change Request	Alert users about most recent load date	2. Medium	8/20/2002	
299	Ready_for_ Approval	Change Request	Modify the Select Quarter prompt	2. Medium	9/12/2002	
322	Assigned	Help Desk Request	Possible Lender errors when creating report	1. High	10/25/2002	
332	Ready_for_ Approval	Change Request	Apply corrections to the FMS annual report	1. High	11/20/2002	
336	Assigned	Help Desk Request	GA Requested and Paid Fields	1. High	11/22/2002	
337	Closed	Help Desk Request	Reset Linda Elrod's Password	1. High	12/3/2002	12/3/2002
338	Closed	Help Desk Request	Reset Rao Palagummi's Password	1. High	12/3/2002	12/3/2002
344	Closed	Help Desk Request	Create GA User ID's	1. High	12/9/2002	12/16/2002
345	Closed	Help Desk Request	Reset James Foley's Password	1. High	12/12/2002	12/12/2002

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Financial Partners Data Mart Requests
Total Requests: 25

ID: MPOps00000229

State: Postponed
Open: 7/23/2002 3:56:58PM
Requestor: Susan Haenel-Beck, 917-767-6435

Description:

Title: Changes to Lender Capitalized Interest report

Priority: 2. Medium
Target Date:

Assigned to: Tina Liu, 202-962-0726

   I need to make a minor change to the Lender Capitalized Interest report. Is there way we can drill to a total for each quarter (i.e., remove the loan type)? I've tried but with no luck.
   Activity Log:

   ===== State: Postponed by:tliu at 8/7/02 11:05:12 AM =====

   Susan wants us to postpone this request since MSTR 7i release will have support to this drill capability without any
   modification on the report.

   ===== State: Assigned by:tliu at 7/23/02 1:24:04 PM =====

   Sent email to Susan:

   There are two ways to implement this: 1. add a subtotal for each quarter (it will sum up every loan type in that quarter) directly
   on the report, no drill needs to be done. 2. add a metric for calculating the total not grouping by the loan type. The metric will
   not show up on the report, but you will be able to drill to it.
     Which way you prefer?

     Note that if we want to remove "Loan Type" from the report, new template needs to be created.

   ===== State: Opened by:tliu at 7/23/02 12:01:37 PM =====

   Sent email to Susan:

   There are two ways to implement this: 1. add a subtotal for each quarter (it will sum up every loan type in that quarter) directly

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on the report, no drill needs to be done. 2. add a metric for calculating the total not grouping by the loan type. The metric will

not show up on the report, but you will be able to drill to it.

Which way you prefer?

ID: MPOps00000253   **Title:**   1.2.6 GA Fee Payments

State: Assigned   **Priority:**   2. Medium
Open: 7/30/2002 7:29:17PM   **Target Date:**
Requestor: Ben Chiu, 415-556-4136

                                                   Assigned to: Mark Mandrella, 202-962-0721

Description:

Portfolio balances, Paid AMF and Paid LPIF do not match Form 2000. One reason is the last payment is made after the fiscal year. For example, 4th QTR AMF was paid in 1st quarter of the next FY. Also for FY 2001, it look like all AMF and LPIF payments were made via Manual invoices in January and did not show up as AMIF or LPIF payments in FMS.

No VFA fees are shown for any of the VFA GA's for 2001. The CSAC VFA Fee looks like it was paid via a manual invoice
in FMS.

Activity Log:

===== State: Assigned by:smcconaghie at 12/10/2002 2:30:11 PM =====

12/10/02 (S. McConaghie): We?re continuing to follow up with Barbara Johnson and Judy Mittman from FMS to ensure all payment

types are accounted for, a process is put into place for future new payment types, and that FMS agrees and signs-off on how we

intend to use this field. Mark is working through the same invoice_num fields that were provided by Nettie for 3 payment

types, and is developing the tentative extract and transform process for each unique date script. Several assumptions need to

be formally addressed (i.e. some dates say ?2002-3Q?, which we need to assign an actual date to). Mark to meet with Nettie on

12/12 in the afternoon.

===== State: Assigned by:mmandrella at 11/25/2002 4:03:30 PM =====

11/25/02 (Mark Mandrella): contacted Barbara Johnson and Judy
Mittman (of FMS) to get an account of all the different
variances of the invoice numbers. When I
get these, I need to work with Nettie to determine how
to get the correct date from each type.

===== State: Assigned by:smcconaghie at 10/29/2002 2:53:17 PM =====

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10/29/02 (S. McConaghie) - Nettie forwarded a sample of the
invoice_num fields for 3 payment types (each has
multiple unique formats) to Mark for review and
feedback. The 3 payment types are
AMF (2 formats), LPIF (2
formats), and PBF (2, possibly 4 formats).

===== State: Assigned by:mmandrella at 10/24/02 3:19:02 PM =====

Nettie emailed saying she would not be able to get the formats this week. She will do it first thing on Monday,
10/28.

===== State: Assigned by:mmandrella at 10/14/02 4:55:28 PM =====

Nettie spoke with Barbara Johnson and Barbara says the invoice_num in FMS has the date.
It is embedded, depending on the payment type. Need to get the formats and look
them over. Right now we do not get this info from FMS. Nettie said she would run a report to show me the formats of the
invoice_num field.

===== State: Assigned by:mmandrella at 10/1/02 4:27:29 PM =====

Sent Nettie Harding a list of attributes and facts retrieved from FMS to use in FMS-related reports. She will discuss the FMS
processes with FMS people.

===== State: Assigned by:smcconaghie at 9/17/02 12:41:53 PM =====

9/17/02 (S. McConaghie) - Will use Invoice Dates instead of Pay
Dates for reports. Will need to work w/FMS to get invoice dates on data feeds.

===== State: Assigned by:tliu at 8/23/02 3:27:02 PM =====

Reassigned to Mark.

===== State: Assigned by:tliu at 8/23/02 11:53:33 AM =====

Verified the Portfolio balance and it seems working fine. Communicated via email with Ben Chiu:

I checked GA 706 for FY01, it seems they add up
the same, the value is: $325,031,666.

Can you please verify it again and let me know what difference you found?

Thanks
Tina

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--- "Chiu, Ben"
<Ben.Chiu@ed.gov> wrote:
> Hi Tina
>
> I agree. It
should be the same as adding the
> Federal, Operating and
> Restricted funds ending balances from the annual
> report to get the
> portofolio
balance. I
believe I
used GA706
when
I

> checked the figures.
>
> Ben
>
> -----Original Message-----
> From: Tina
Liu
[mailto:sli_
tina@yahoo.com
]

> Sent: Thursday, August 22, 2002 10:57 AM
> To: ben.chiu@ed.gov
> Cc: Mark Mandrella; Al
Bradley
> Subject: GA Fee Payments:
Portfolio balances
>
>
> Hi Ben,
>
>   Thank you for attending the
meeting today.
I

> checked the calculation of Portfolio balances in the
> report <GA Fee Payments>, it seems it should be the
> same as adding up principal, interest, and other
> ending balances all together from Form 2000 annual
> report. Can you give us an example
GA ID for

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this
> problem?
>
> Thanks
> Tina

===== State: Assigned by:tliu at 8/23/02 11:52:12 AM =====

Had meeting with FMS and Ben Chiu, sent out a note after the meeting to get more information from FMS:

1. We need to
use
INVOICE_NU
M from table
ap_invoices_all to aggregate on requested and paid
fees for a specific fiscal year. Can FMS send us the
exact format of
INVOICE_NUM for
all types of invoices?

2. How FMS determine the actual invoice type (VFA,
LPIF, AMF, etc.)
for a manual invoice entry?

3. What is the relationship between table
ffelga_soa_reports and ap_invoice_payments_all?
Suppose we add up all types of payments for an
individual GA during fiscal year 2001 from table
ap_invoice_payments_all, can we get the same amount
from table ffelga_soa_reports?

===== State: Assigned by:tliu at 8/13/02 2:35:08 PM =====

Mark sent out email asking for the report spreadsheet from FMS.

===== State: Assigned by:tliu at 8/7/02 11:55:44 AM =====

The FMS developer Prasanth
Kundapur sent the
SQL statements behind the
scene.

===== State: Assigned by:tliu at 8/5/02 10:45:00 AM =====

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Called FMS DBA Marcus and sent email
to Todd Kaywood on 8/2/02,
asking for SQL query behind
generating the following FMS reports (quote
from Ben Chiu's
email):

>For Total Fees Paid, I ran the "SFA GA SOA Detail Report". For the AMF and LPIF
payments, I ran "SFA GA SOA
NSLDS AMF Detailed Report" and "SFA GA SOA NSLDS LPIF Detailed Report".

ID:	MPOps00000254	**Title:**	1.2.6.1 GA Requested and Paid Fees
State:	Assigned	**Priority:**	2. Medium
Open:	7/30/2002 7:30:32PM	**Target Date:**	
Requestor:	Ben Chiu, 415-556-4136		
		Assigned to:	Mark Mandrella, 202-962-0721

Description:

All three tested GAs show a manual paid invoice on 1/16/01. These figures look like an AMF payments. No entry for VFA fees. Checked all 4 VFAs. All but CSAC had weekly Paid Manual Invoices which probably is their Weekly Claim Payments Process. CSACs VFA fee looks like it showed up on 12/21/01 as a manual Paid Invoice.

the Requested AMF is inaccurate since it matches Paid AMF which we know is wrong. Requested LPIF does not match FMS
Annual Report.

Ben McPherson also logged a request regarding this same report. Now combine them together. He said the payment was
calculated in the year paid not the year earned.

Activity Log:

===== State: Assigned by:mmandrella at 12/19/02 3:30:46 PM =====

Emailed Ben Chiu and asked if he could provide me with the FMS Annual report data for the Requested AMF and Requested
LPIF Fees.

===== State: Assigned by:smcconaghie at 12/10/2002 2:31:09 PM =====

12/10/02 (S. McConaghie): We?re continuing to follow up with Barbara Johnson and Judy Mittman from FMS to ensure all payment
types are accounted for, a process is put into place for future new payment types, and that FMS agrees and signs-off on how we

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intend to use this field. Mark is working through the same invoice_num fields that were provided by Nettie for 3 payment
  types, and is developing the tentative extract and transform process for each unique date script. Several assumptions need to
  be formally addressed (i.e. some dates say ?2002-3Q?, which we need to assign an actual date to). Mark to meet with Nettie on
  12/12 in the afternoon.

===== State: Assigned by:mmandrella at 11/25/2002 4:02:49 PM =====

 11/25/02 (Mark Mandrella): contacted Barbara Johnson and Judy Mittman (of FMS) to get an account of all the different
  variances of the invoice numbers. When I get these, I need to work with Nettie to determine how to get the correct date from
  each type.

===== State: Assigned by:smcconaghie at 10/29/2002 2:55:00 PM =====

 10/29/02 (S. McConaghie) - Nettie forwarded a sample of the invoice_num fields for 3 payment types (each has multiple
  unique formats) to Mark for review and feedback. The 3 payment types are AMF (2 formats), LPIF (2 formats), and PBF (2,
  possibly 4 formats).

===== State: Assigned by:mmandrella at 10/24/02 3:18:33 PM =====

 Nettie emailed saying she would not be able to get the formats this week. She will do it first thing on Monday, 10/28.

===== State: Assigned by:mmandrella at 10/14/02 4:56:08 PM =====

 Nettie spoke with Barbara Johnson and Barbara says the invoice_num in FMS has the date. It is embedded, depending on the
  payment type. Need to get the formats and look them over. Right now we do not get this info from FMS. Nettie said she would
  run a report to show me the formats of the invoice_num field.

===== State: Assigned by:mmandrella at 10/1/02 4:26:57 PM =====

 Sent Nettie Harding a list of attributes and facts retrieved from FMS to use in FMS-related reports. She will discuss the FMS
  processes with FMS people.

===== State: Assigned by:smcconaghie at 9/17/02 12:42:12 PM =====

 9/17/02 (S. McConaghie) - Will use Invoice Dates instead of Pay Dates for reports. Will need to work w/FMS to get invoice

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dates on data feeds.

===== State: Assigned by:tliu at 8/23/02 3:27:52 PM =====

Reassigned to Mark.

===== State: Needs_Clarification by:tliu at 8/12/02 2:24:00 PM =====

Updated the description with Ben
McPherson's
comments.

===== State: Needs_Clarification by:tliu at 8/7/02 11:03:09 AM =====

 Please provide detailed information about the mismatching data. For example, the actual dollar amount difference between the
 FMS report(s) and the data mart report.

===== State: Needs_Clarification by:tliu at 8/2/02 10:42:23 AM =====

 Checked the SR_F_GA_INVOICES table and found out that all requested and paid AMF fees match each other. Needs to call Ben
 Chiu to clarify how to calculate the requested and paid fees, specifically grouping on what time attribute (right now, both are
 aggregated based on invoice date).

ID:	MPOps00000255	**Title:**	1.2.7 GA Fee Payments History Report
State:	Assigned	**Priority:**	2. Medium
Open:	7/30/2002 7:32:26PM	**Target Date:**	
Requestor:	Ben Chiu, 415-556-4136		
		Assigned to:	Mark Mandrella, 202-962-0721

Description:

 All three tested GAs show a manual paid invoice on 1/16/01. These figures look like an AMF payments. No
entry for VFA fees. Checked all 4 VFAs. All but CSAC had weekly Paid Manual Invoices which probably is their
Weekly Claim Payments Process. CSACs VFA fee looks like it showed up on 12/21/01 as a manual Paid Invoice.

 the Total Fees Paid does not match FMS (added all monthly SOAs for GA 706 FY-2001).
Activity Log:

===== State: Assigned by:smcconaghie at 12/10/2002 2:31:50 PM =====

 12/10/02 (S. McConaghie): We?re continuing to follow up with Barbara Johnson and Judy Mittman from FMS to ensure all payment
 types are accounted for, a process is put into place for future new payment types, and that FMS agrees and signs-off on how we

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intend to use this field. Mark is working through the same invoice_num fields that were provided by Nettie for 3 payment
 types, and is developing the tentative extract and transform process for each unique date script. Several assumptions need to
 be formally addressed (i.e. some dates say ?2002-3Q?, which we need to assign an actual date to). Mark to meet with Nettie on
 12/12 in the afternoon.

===== State: Assigned by:mmandrella at 11/25/2002 4:01:58 PM =====

11/25/02 (Mark Mandrella): contacted Barbara Johnson and Judy
Mittman (of FMS) to get an account of all the different
variances of the invoice numbers. When I
get these, I need to work with Nettie to determine how
to get the correct date from each type.

===== State: Assigned by:smcconaghie at 10/29/2002 2:57:00 PM =====

10/29/02 (S. McConaghie) - Nettie forwarded a sample of the
invoice_num fields for 3 payment types (each has
multiple unique formats) to Mark for review and
feedback. The 3 payment types are
AMF (2 formats), LPIF (2
formats), and PBF (2, possibly 4 formats).

===== State: Assigned by:mmandrella at 10/24/02 3:18:06 PM =====

 Nettie emailed saying she would not be able to get the formats this week. She will do it first thing on Monday, 10/28.

===== State: Assigned by:mmandrella at 10/14/02 4:57:49 PM =====

 Nettie spoke with Barbara Johnson and Barbara says the invoice_num in FMS has the date.
 It is embedded, depending on the payment type. Need to get the formats and look
 them over. Right now we do not get this info from FMS. Nettie said she would run a report to show me the formats of the
 invoice_num field.

===== State: Assigned by:mmandrella at 10/1/02 4:26:21 PM =====

 Sent Nettie Harding a list of attributes and facts retrieved from FMS to use in FMS-related reports. She will discuss the FMS
 processes with FMS people.

===== State: Assigned by:smcconaghie at 9/17/02 12:42:30 PM =====

9/17/02 (S. McConaghie) - Will use Invoice Dates instead of Pay

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Dates for reports. Will need to work w/FMS to get invoice dates on data feeds.

===== State: Assigned by:tliu at 8/23/02 3:30:31 PM =====

Reassigned to Mark.

ID:	MPOps00000259	**Title:**	Drill to multiple templates in report - E32

State:	Postponed	**Priority:**	3. Low
Open:	7/28/2001 4:03:57PM	**Target Date:**	
Requestor:	Susan Haenel-Beck, 917-767-6435		
		Assigned to:	Tina Liu, 202-962-0726

Description:

Drill to multiple templates for "Consolidation Load Fee Payment Analysis Report

Activity Log:

===== State: Opened by:lphillips at 7/31/02 12:06:13 PM =====

8/21/2001 (Annie Barton) Waiting for new release of Microstrategy

8/22/2001 (Keisha Contee) Our Microstrategy Case #137013 for this enhancement has been logged as an enhancement (Log id 127716) on the Microstrategy Side. We need to wait for a release that states, 127716 has been fixed.

11/29/01 (Bob Audet) Called MicroStrategy Technical Services to verify the status of the enhancement. Currently not fix date has been determined by MicroStrategy Technology. Estimated time would be Q2 2002, second release of 7.2. Reassigned to Robert Audet.

1/2/2002 (Tina Liu) Reassigned to Tina

1/22/2002 (Tina Liu) Discussed with Ahmad and he suggested to put the request type to Enhancement because we do not know if the Phase II will be using MSTR 7.2 or not.

ID:	MPOps00000260	**Title:**	Data Mart users lose access when NT patches are in

State:	Postponed	**Priority:**	3. Low
Open:	7/18/2001 4:19:05PM	**Target Date:**	
Requestor:	Lisa Phillips, 202-962-0724		
		Assigned to:	Tina Liu, 202-962-0726

Description:

Data Mart users lose access to Microstrategy reports when patches are installed on the NT server.

Activity Log:

===== State: Opened by:lphillips at 7/31/02 12:20:25 PM =====

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7/18/2001 (Keisha Contee) Annie logged problem on the Microstrategy web site. Microstrategy suggested we
upgrade to version 7.1.1 and the problem would be resolved. We are currently running version 7.1.1. Annie will
continue to investigate the issue.

11/26/01 (Bob Audet) We tried to add groups in 2-tier mode with server down. Still does not work. Reassigned to
Bob.

12/14/01 (Bob Audet) Recommend further research. May want to postpone until next upgrade at DOE.

1/2/2002 (Tina Liu) Reassigned to Tina.

1/3/2002 (Tina Liu) Reassigned to Mark.

1/23/2002 (Tina Liu) Reassigned to Tina.

ID:	MPOps00000261	**Title:**	Page-by area not working as expected
State:	Postponed	**Priority:**	2. Medium
Open:	6/4/2001 4:21:54PM	**Target Date:**	
Requestor:	Tina Liu, 202-962-0726		
		Assigned to:	

Description:

This was logged as a problem with MicroStrategy. The MicroStrategy case number is: 130845. During testing,
we fixed the report that had the problem, however there is the possibility that a user may modify their version
of a report to re-create this problem.
Activity Log:

ID:	MPOps00000262	**Title:**	Search for Lender by name
State:	Postponed	**Priority:**	1. High
Open:	6/4/2001 4:25:18PM	**Target Date:**	
Requestor:	Tina Liu, 202-962-0726		
		Assigned to:	Tina Liu, 202-962-0726

Description:

The users wanted to be able to lookup by a lender name instead of a lender id. Annie put in most of the ability
to do this, but then ran into a problem with MicroStrategy. She logged a MicroStrategy case number: 128596.
Annie was able to allow a user to lookup a lender by typing in a one-word name, but the problem comes in when
trying to search when multiple words are given.
Activity Log:

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===== State: Opened by:lphillips at 7/31/02 12:26:21 PM =====

6/7/2001 (Annie Barton) Paul requested to search by lender name as well for Consolidation Loan Rebate Fee Report.

7/10/2001 (Annie Barton) Defect in Microstrategy. Need to wait for new release to fix the problem.

8/4/2001(Annie Barton) Susan Haenel-Beck requested to search by lender name as well for Consolidation Loan Rebate Fee Report.

11/29/01 (Bob Audet) Called MicroStrategy Technical Support and they fixed confirmed the issue for release 7.2
Beta 1. I recommend that we wait until general availability of 7.2 in Q1 of 2002.

1/2/2002 (Tina Liu) Reassigned to Tina.

ID:	MPOps00000263	**Title:**	Login before projects are displayed
State:	Postponed	**Priority:**	1. High
Open:	9/6/2001 4:26:34PM	**Target Date:**	
Requestor:	Tina Liu, 202-962-0726		
		Assigned to:	Tina Liu, 202-962-0726

Description:

For security purposes it is better if the user logs in first and then chooses the appropriate project. This method will only display the projects the user can access. With situation, when the users' password expires, they are not prompted to change it and locked out of the project.

Activity Log:

===== State: Opened by:lphillips at 7/31/02 12:27:42 PM =====

9/6/2001 (Annie Barton) Awaiting a new release in Microstrategy to implement this new procedure.

11/26/2001 (Bob Audet) This issue is linked to issue #229, Assigned to Bob.

11/29/01 (Bob Audet) Emailed the FP Power Users to decide if this issue should be closed since a workaround from Issue #229 was provided and the issue subsequently closed.

12/03/01 (Bob Audet) Moved to 'Needs Clarification' because the FP Power Users need to decide whether this issue can be closed since it is similar to Issue #229 that was closed.

1/2/2002 (Tina Liu) Reassigned to Tina.

1/11/2002 (Tina Liu) Sent email to Nettie Harding for action update.

1/18/2002 (Tina Liu) called Nettie to clarify the status and then called Tech support, logging two issues: 155688

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for desktop password expiration reminder and 155689 for web login twice. Tech support for issue 155689 provided a resolution: log in as Administrator, click on a project -> preferences -> Project defaults -> Project display and change the Project list selection from "Show all the projects connected to the Web Server before the user logs in" to "Log in, then show the projects accessible by the supplied login". This setting will not hold after user logs out and then relogin after a while. Reset the target date to 2/1/2002.

1/22/02 (Tina Liu): The preference setting on production server was actually successful after rechecking it today. But the dev web server reported error: "'Error Saving Personal Preferences. Your project default preferences could not be saved. Your permissions on the Web folder or in its contents may be incorrect". MSTR Tech Support provided two tech notes "TN5600-7X0-0304" and :N5600-7X0-0142" to tackle this issue. Sent email to Benson Hwang for the security property setting of file AdminOptions.xml on dev server. Benson changed the setting to allow changes, now it works on dev server as well.

1/29/02 (Tina Liu): The login and projects setting works fine with MSTR Web 7.1.2 version but is not stable for the 7.1 version. For the password expiration problem, MSTR Tech support is still investigating on it. For now, run scripts in MSTR Command center to gather user profiles and run a java program accenture.modpartner.datamart.FileTransform to change the format of the user profile files to be sorted in ascending order based on the password expiration time and put properties of the same user into one row, which
may later be exported to an Excel file and sent to Willie Sutton. The first file generated on today has already been sent to Willie to review.

1/30/2002 (Tina Liu): MSTR Tech Support sent email confirming that the password expiration problem has been
fixed for MSTR Web release 7.2, which is scheduled to come in late Q1/2002 or early Q2/2002. Change the status to be postponed until the next upgrade to MSTR 7.2.

2/11/2002 (Tina Liu): Figured out the unstable setting problem is indeed a dual-web server issue. When the setting was changed, it was only applied to one of the web servers, this is why we may observe different behavior for the default page. Set to use "Login.asp" for both web servers. The password expiration problem will still occur. Needs to remind users to use "Projects.asp" to change password when it is reset by the administrator to force change of password at next login.

ID:	MPOps00000264	**Title:**	Subtotals appearing at top of Report
State:	Postponed	**Priority:**	3. Low
Open:	2/21/2002 5:28:10PM	**Target Date:**	
Requestor:	Susan Haenel-Beck, 917-767-6435		
		Assigned to:	Lisa Phillips, 202-962-0724

Description:

When running the Part II and Part III reports from the web the totals are displayed at the bottom of each lender. When moving the "Quarter Ending Date" from the columns to rows, the subtotals now appear at the top of each
lender.

Activity Log:

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===== State: Opened by:lphillips at 7/31/02 12:31:00 PM =====

2/21 (LP): In a meeting with the power users it was discussed that we move the Qtrs from the column to the rows in template to fix the problem.

2/21(LP): Could not move the Qtrs from the column to rows. Error still occurs. This is a problem with MSTR 7.1
 but has been identified for the next release: This note is from their support site:

Defects and enhancements addressed in MicroStrategy 7 7.1.3
 MicroStrategy Agent 7.1.1 TS Case 141024 Subtotals are always displayed at the top if attributes are sorted

ID:	MPOps00000265	**Title:**	We need to use dynamic quarter prompts

State:	Postponed	**Priority:**	3. Low
Open:	2/22/2002 5:31:04PM	**Target Date:**	
Requestor:	Tina Liu, 202-962-0726		
		Assigned to:	Tina Liu, 202-962-0726

Description:

Some quarter prompts in FP data mart use a pre-selected element list with the ending quarter of September 2001
 (or December 2001) should be changed to be dynamic prompts that will include only those valid quarters that
 appear in the related fact source table(s).
Activity Log:

===== State: Opened by:lphillips at 7/31/02 12:32:08 PM =====

2/22/2002 (Tina Liu): Opened the issue and assigned to Tina. This is postponed due to a bug with MicroStrategy
 Web 7.1 (it does not support set qualification type of filter). Should be fixed in 7i release on March-April time

ID:	MPOps00000266	**Title:**	No Limit for login attempts

State:	Postponed	**Priority:**	3. Low
Open:	3/4/2002 5:32:12PM	**Target Date:**	
Requestor:	Tina Liu, 202-962-0726		
		Assigned to:	Tina Liu, 202-962-0726

Description:

There is no limit to the number of invalid access attempts that may occur for a given user on the CMDM (or any
 datamart).

Case entered with Microstrategy (#160279)
Activity Log:

ID:	MPOps00000268	**Title:**	Automated Report to check for GA Access Violation

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State: Postponed	**Priority:** 2. Medium
Open: 6/17/2002 4:35:03PM	**Target Date:**
Requestor: Tina Liu, 202-962-0726	
	Assigned to: Tina Liu, 202-962-0726

Description:

Schedule an automated report that will indicate if GA user access (GA users can see only their own GA's data) has been broken. The report should run at least once a week, possibly every day. Use Microstrategy alert feature if it is available in the next release.

Activity Log:

===== State: Opened by:lphillips at 7/31/02 12:36:13 PM =====

7/15/02 (T.Liu): Has not found any easy solution to this request. It is not supported by current or new version of MSTR. Postponed for now.

ID: MPOps00000269	**Title:** Drilling Problem
State: Postponed	**Priority:** 1. High
Open: 7/15/2002 4:53:25PM	**Target Date:**
Requestor: Tina Liu, 202-962-0726	
	Assigned to: Tina Liu, 202-962-0726

Description:

MicroStrategy web 7.1 does not take drilling setting from report. In order to allow users to drill from Lender Scorecard summary report to individual lender scorecard report, we have to set web drilling setting to "allow drilling everywhere". Under this setting, users will be able to drill to some areas that should not be exposed to users or users will get server error when trying to drill. An example problem is for the report "Lender ED 799 Late". When user tried to drill on the metric, he got a new metric called "Max FQ Ending Date" in Julia format. We should never allow users to see this metric.

Activity Log:

===== State: Opened by:lphillips at 7/31/02 12:54:34 PM =====

7/15/02 (T.Liu): Opened the SIR. Since it is an known bug for web 7.1. We will need to revisit this issue after installing 7i.

ID: MPOps00000282	**Title:** Needs to insert manual VFA performance data
State: Assigned	**Priority:** 2. Medium
Open: 8/20/2002 5:28:52PM	**Target Date:**
Requestor: Lee Harris, 202-377-3097	
	Assigned to: Al Bradley, 202-962-0661

Description:

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We need to have manual data inserted into F_VFA_PERF_RPT_NSLDS and F_VFA_PERF_RPT_FMS to cover the FY 2000-2002. For

FMS, we can get FY2001 and FY2002 data directly through the FMS ICD and Informatica mapping, but the way we calculate the

Collection Recovery Rate field in our data mart is different than what have been used in previous benchmark manual reports.

The difference lies in the usage of MR_27,which is either a monthly or quarterly based field. For NSLDS, data mart only

contains data corresponding to the extract date of 7/3/2002 and 7/28/2002. We need to get all the rest of the data from manual

benchmark reports.

Activity Log:

===== State: Assigned by:smcconaghie at 12/10/2002 2:35:07 PM =====

12/10/02: (S. McConaghie) - Continuing to validate the Collections Recovery Rate metric. Nettie reviewed Al?s email status and

has questions. Nettie is currently working to determine source, by finding out where Gary is getting the data from.

Investigating is the problem resides within Collections. Nettie and Al will meet on 12/11 @ 10am to discuss further. Al

stated that there may be an FP FMS load problem with data missing from the fact tables.

===== State: Assigned by:smcconaghie at 11/26/2002 6:31:33 PM =====

11/26/02: (S. McConaghie) - Continuing to validate the Collections Recovery Rate metric. Al contacted Gary Hopkins to work

through issues between Quarterly Report, Collections website, and FP data. Al to meet with Nettie regarding source of

Quarterly Report, and determine discrepancy between us (FP) and the other two.

===== State: Assigned by:abradley at 11/25/2002 6:20:32 PM =====

11/23/02
Gary suggested that an analysis be preformed on end of FY data (September 2002). There are still cases where FP does not match

the Quarterly GA Collections Report or the Collections website. I am comparing the FP source files to the Quarterly Report to

identify the discrepancies.
11/12/02 (Al Bradley) Per Ora, datamart numbers should be consistent with the numbers published on the collections website.

Not sure if this is possible, since FP receives some of the collections info from a feed. Need to follow-up with Ora and Gary.
10/28/02 (A. Bradley) - Al to set up meeting with Ora.

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10/15/02 (S. McConaghie) - Continuing to validate the Collections Recovery Rate metric. Al collected data from multiple

  sources, and sent an aggregate of this data to Ora Chowbay for assistance in reconciliation.

===== State: Assigned by:abradley at 11/12/02 10:02:21 AM =====

11/12/02 (Al Bradley) Per Ora, datamart numbers should be consistent with the numbers published on the collections website.
  Not sure if this is possible, since FP receives some of the collections info from a feed. Need to follow-up with Ora and Gary.
  10/28/02 (A. Bradley) - Al to set up meeting with Ora.

  10/15/02 (S. McConaghie) - Continuing to validate the Collections Recovery Rate metric. Al collected data from multiple

  sources, and sent an aggregate of this data to Ora Chowbay for assistance in reconciliation.

===== State: Assigned by:abradley at 10/28/2002 4:42:50 PM =====

10/28/02 (A. Bradley) - Al to set up meeting with Ora.

  10/15/02 (S. McConaghie) - Continuing to validate the Collections Recovery Rate metric. Al collected data from multiple

  sources, and sent an aggregate of this data to Ora Chowbay for assistance in reconciliation.

===== State: Assigned by:smcconaghie at 10/15/2002 1:23:49 PM =====

  10/15/02 (S. McConaghie) - Continuing to validate the Collections Recovery Rate metric. Al collected data from multiple

  sources, and sent an aggregate of this data to Ora Chowbay for assistance in reconciliation.

===== State: Assigned by:abradley at 10/10/2002 11:40:22 AM =====

9/17/02 (S. McConaghie) - Trigger Rate problem corrected, Collections Recovery Rate being researched.

10/9/02 (A. Bradley)
The June 2002 FP numerators and denominators
have been compared to the Quarterly GA COllections Report
and the GA Recovery Rates published
on the Web.

Denominator: Four GAs are out of balance. Confirm that these should be manually updated in FP.

Numerator: Five GA's are out of balance when compared to the GA
Quarterly report. Comparing the FP source to the Quarterly report to identify the differences.

===== State: Assigned by:smcconaghie at 9/17/02 12:47:31 PM =====

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9/17/02 (S. McConaghie) - Trigger Rate problem corrected, Collections Recovery Rate being researched.

===== State: Assigned by:tliu at 8/22/02 11:42:03 AM =====

Tried to schedule a meeting on Friday
(8/23/02) at 11:00 AM or 1:00PM in
Lee's office. Part of NSLDS
manual data have been copy-pasted to a spreadsheet. The following problems still remain:

1. Get data from FMS for FY00
2. MR_27 issue
3. Get data from NSLDS for
monthly "Net Guarantee"
amount. Currently only quarter amount is available.
4. Get data from NSLDS for fiscal month 7 and 8 of
FY02. Currently data mart contains extracts from 7/3/02 and
7/28/02 (need to verify that they correspond to fiscal month 9 and 10 of FY02).
===== State: Opened by:tliu at 8/20/02 1:39:54 PM =====

Contacted Lee Harris and got a bunch of reference
spreadsheet files. Sent email to Gary Hopkins (Gary.Hopkins@ed.gov,
377-3208) asking about the MR_27 issue. Needs to set
up a time to meet with him and
Lee
Harris.

ID:	MPOps00000283	**Title:**	Add Graphs to FP Rel 2 Reports
State:	Assigned	**Priority:**	2. Medium
Open:	8/20/2002 6:13:48PM	**Target Date:**	
Requestor:	Lee Harris, 202-377-3097		
		Assigned to:	Michael Ko, 202-962-0726

Description:

Lee Harris wants line-graphs included in the GA VFA Performance Measures Reports (both NSLDS and FMS).

The line graphs should mirror the report grids: one line for each GA in the report (706, 725, 748, and 755). Also, one graph
should be made for each metric.

I was provided handouts of graphs prepared by KPMG. The reports should mirror these.

Activity Log:

===== State: Assigned by:smcconaghie at 12/10/2002 2:36:50 PM =====

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12/10/02 (SMcConaghie) - Will be completed once MPOps282 is completed, as the graphs are dependant on the VFA report
working correctly. Re-assigning to Michael Ko.

===== State: Assigned by:smcconaghie at 10/15/2002 1:24:54 PM =====

10/15/02 (SMcConaghie) - No update

ID:	MPOps00000284	**Title:**	Alert users about most recent load date
State:	Postponed	**Priority:**	2. Medium
Open:	8/20/2002 8:33:47PM	**Target Date:**	
Requestor:	Nettie Harding, 202-377-3307		
		Assigned to:	

Description:

Users want to get an alert about the last load date from all four source systems: PEPS, FFEL, NSLDS, and FMS. Currently we
have a report <Data Mart Update Information> that is updated every month after FFEL load. We need to get rid of this report
when MSTR 7i is installed and use the alert feature provided by MSTR 7i.

Activity Log:

ID:	MPOps00000299	**Title:**	Modify the Select Quarter prompt
State:	Ready_for_Approval	**Priority:**	2. Medium
Open:	9/12/2002 1:41:53PM	**Target Date:**	
Requestor:	Nettie Harding, 202-377-3307		
		Assigned to:	Al Bradley, 202-962-0661

Description:

Filter or limit the quarters that appear in the prompt to dates that have fact data.

Activity Log:

===== State: Ready_for_Approval by:abradley at 11/12/02 9:59:07 AM =====

11/12/02 (A. Bradley) - Updated D_FY and D_FISCAL_QUARTER table structures to support automated prompt updates. Oracle
script will be executed each time a FY or Qtr is released. Script to be added to the FP Ops Guide.

10/28/02 (A. Bradley) - The current solution requires a manual update to the filters when a new quarter is released.

10/15/02 (S. McConaghie) - In TEST. Al continuing to work issue.
===== State: Assigned by:abradley at 10/28/2002 5:32:56 PM =====

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10/28/02 (A. Bradley) - The current solution requires a manual update to the filters when a new quarter is released.

10/15/02 (S. McConaghie) - In TEST. Al continuing to work issue.

===== State: Assigned by:smcconaghie at 10/15/2002 1:34:24 PM =====

10/15/02 (S. McConaghie) - In TEST. Al continuing to work issue.

===== State: Assigned by:smcconaghie at 9/17/02 12:51:04 PM =====

9/17/02 (S. McConaghie) - Ready to be migrated to TEST.

ID:	MPOps00000322	**Title:**	Possible Lender errors when creating report
State:	Assigned	**Priority:**	1. High
Open:	10/25/2002 4:15:45	**Target Date:**	
Requestor:	Willie Sutton, 202-377-3320		
		Assigned to:	Mark Mandrella, 202-962-0721

Description:

I logged onto DataMart and tried to create a 799 quarterly report for a
 specific lender. I chose the lender out of the "available" list and moved it over to the box that showed the lender that I'd
 selected to create a report on. Instead of giving me a report for lender 807807, it gave me a report for 800325 (the first lender
 in the "available" list). I chose a different lender 806746, and the same thing happened.
 Please let me know
 if my question isn't clear.
 Than
 ks
 !

Stephanie M.
Wilson

MOSTARS Compliance Reviewer
Missouri Coordinating Board for Higher Education
3515 Amazonas
Drive
Jefferson City, MO
65109
ph:
573-75
1-4603

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fax:
573-75
1-6635

e-mail:
stephanie.wilson@mocbhe.gov
Activity Log:

===== State: Assigned by:mmandrella at 12/16/2002 10:19:01 AM =====

reassigned to Mark - I did this since I was working with Nettie and DMIT users anyway. Seemed the best way
to go...

===== State: Assigned by:smcconaghie at 12/10/2002 2:41:17 PM =====

12/10/02 (S. McConaghie) - Lender 799: Entire Report Issue. Currently investigating if we should pull this
report until it is
working correctly. Nettie to work w/Mark to determine how the report is used by the community. This
discussion will happen on
12/12 in the afternoon. Nettie to send out updated status on the results of her discussion with Mark. Given the
direction to
do so, Al will work to force users to select 1 qtr and 1 lender from list. Determined that it would be too
confusing to
remove the ?page by? and move the data into report. This is the same approached that we used in the
LEAP/SLEAP report.

ID:	MPOps00000332	**Title:**	Apply corrections to the FMS annual report
State:	Ready_for_Approval	**Priority:**	1. High
Open:	11/20/2002 6:21:55	**Target Date:**	
Requestor:	Nettie Harding, 202-377-3307		
		Assigned to:	Al Bradley, 202-962-0661

Description:

Adjustments that were made by several guarantors to the original Form 2000 annual report submissions needs
to be applied to
the Data Mart data so that it is current and accurate. FMS has no mechanism of applying the adjustments to
their system,
therefore, this data needs to be manually applied to Data Mart.
Activity Log:

===== State: Assigned by:smcconaghie at 12/10/2002 2:54:45 PM =====

12/10/02 (S. McConaghie) - FY01 data that has already been received needs to be updated. Al has received the
data from
Nettie, and will move it to TEST by COB on 12/10, and notify Nettie to begin testing.

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===== State: Assigned by:abradley at 11/26/2002 10:51:05 AM =====

The recommended approach is to write a script to update the desired metrics in the source file (sr_ffelga_annual_reports) in
the dev, test and prod environemnts. After the source files are corrected the informatica process for loading table
f_fm2000_annl should be executed for FY2001 by GA if possible.

ID:	MPOps00000336	**Title:**	GA Requested and Paid Fields
State:	Assigned	**Priority:**	1. High
Open:	11/22/2002 12:05:00	**Target Date:**	
Requestor:	Mike Duffin, 312-886-4459		
		Assigned to:	Michael Ko, 202-962-0726

Description:

It appears that the report is doubling the AMF and the LPIF for FY 2002. For example, the dollar amount for USAF should be approximately $47 million. The report shows $95 million.

Activity Log:

===== State: Assigned by:smcconaghie at 12/10/2002 2:56:42 PM =====

12/10/02 (S. McConaghie) - Pending further testing. There is currently a data issue with duplicate records. Michael is
confirming that all duplicates have been removed.

ID:	MPOps00000337	**Title:**	Reset Linda Elrod's Password
State:	Closed	**Priority:**	1. High
Open:	12/3/2002 2:42:23PM	**Target Date:**	12/3/2002 5:00:00A
Requestor:	Willie Sutton, 202-377-3320		
		Assigned to:	Mark Mandrella, 202-962-0721

Description:

Reset Linda Elrod's FPDM Password

Activity Log:

ID:	MPOps00000338	**Title:**	Reset Rao Palagummi's Password
State:	Closed	**Priority:**	1. High
Open:	12/3/2002 2:44:50PM	**Target Date:**	12/3/2002 5:00:00A
Requestor:	Willie Sutton, 202-377-3320		
		Assigned to:	Mark Mandrella, 202-962-0721

Description:

Reset Rao Palagummi's FPDM Password

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ID: MPOps00000344

State: Closed
Open: 12/9/2002 9:23:44PM
Requestor: Willie Sutton, 202-377-3320

Description:

FP Data Mart Access Request - 12-09-02

NAME GA# ADDRESS PHONE COMMENTS
Cobos, Andrea 927 Educational Credit Management Corporation
651-767-3056 Also requires access under GA#951

Dixon, Paul 927 Educational Credit Management Corporation
651-767-3044 Also requires access under GA #951

Cobos, Andrea 951 Educational Credit Management Corporation
651-767-3056 Also requires access under GA #927

Dixon, Paul 951 Educational Credit Management Corporation
651-767-3044 Also requires access under GA #927

Hendrickson, Douglas 951 Educational Credit Management Corporation 804-267-7102
Activity Log:

===== State: Closed by:mmandrella at 12/16/2002 10:09:24 AM =====

Created ID's on 12/11 - paperwork delivered to Willie on 12/16

Title: Create GA User ID's

Priority: 1. High
Target Date: 12/11/2002 5:00:00

Assigned to: Mark Mandrella, 202-962-0721

ID: MPOps00000345

State: Closed
Open: 12/12/2002 4:07:09
Requestor: Willie Sutton, 202-377-3320

Description:

Reset James Foley's FPDM Password
Activity Log:

Title: Reset James Foley's Password

Priority: 1. High
Target Date: 12/12/2002 5:00:00

Assigned to: Mark Mandrella, 202-962-0721

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